

# GEORGIA STATE UNIVERSITY FOUNDATION

## Endowment/Non Endowed/Quasi-Endowed Agreement and Endowed Scholarship/Non Endowed Scholarship Agreement

### Request Form

*Endowment agreements are intended to define the purpose of an **endowed fund** whose principles are agreed upon by the Georgia State University Foundation and the donor.*

*Scholarship agreements are used for financial support to aid a student at an educational institution in the pursuit of studies. The student may be either an undergraduate or a graduate. Typically, these payments are to be used for educational purposes such as tuition, fees, room and board, books, supplies, and transportation. These funds can be endowed or un-endowed.*

*Endowment/Scholarship descriptions are internal foundation forms created to document an **endowed fund, quasi endowment** (aka a fund functioning as an endowment), or scholarship when it is impractical or impossible to identify or contact a donor as a signatory to an endowment agreement.*

*These documents should be able to withstand the test of time. They should allow flexibility within reason on the part of the university.*

#### I. Official name of endowed fund to be established

\_\_\_\_\_

(Note: Maximum number of characters allowed by Financial Edge is 60.)

#### II. Type of document (choose one):

- Endowment Agreement
- Endowment Description
- Scholarship Agreement (non endowment)
- Scholarship Description (non endowment)
- Memorandum to File
- Don't Know / Not sure

#### III. Primary donor information

Constituent ID: \_\_\_\_\_ Name: \_\_\_\_\_

List name of Reporting Contact if different from Primary Donor. \_\_\_\_\_

For corporations, foundations and other organizations. Please give name of contact and title.

Name \_\_\_\_\_ Title \_\_\_\_\_

**Background information on primary donor and fund** (*for use in part I of the agreement/description – if you require additional space, please attach a separate document with corresponding numerals.*)

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Endowed Scholarship/Non Endowed Scholarship Agreement**

**IV. Purpose and attributes of fund**

**Purpose Description** *(for use in Financial Edge, web sites and university publications)*

**Type of endowment (choose one)**

- Endowment (Non scholarship)
- Endowment - scholarship
- Quasi-endowment
- Scholarship (non endowed)
- Don't know/not sure

**Benefitting Unit (please list)**

\_\_\_\_\_

**Fund/investment type (choose one)**

- Endowed scholarship fund
- Endowed fund (not scholarship)
- Un-endowed scholarship

**Department (please list)**

\_\_\_\_\_

**Opportunity Type (choose one)**

- Scholarship
- Professorship
- Chair
- Other \_\_\_\_\_

**FOUNDATION USE ONLY**  
**FASB (choose one)**  
 a. Permanently restricted  
 b. Temporarily restricted  
 c. Don't know/not sure

**V. Stewardship**

**Reporting contact** \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

**Administrative contact (choose one)**

- Dean of college
- Associate provost, academic programs
- Athletics director
- Vice president for student affairs
- Dean of library
- Sr. vice president for finance & administration
- President, foundation
- Other: \_\_\_\_\_

**Are there any additional reporting requirements (such as detailed reports required by a foundation or corporation)? If so, please explain below.**

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### VI. Funding plan

Type of gift(s) - check all that apply

- Outright gift     Pledge     Matching Gift     Planned Gift     Other

Please list gift details or funding plan (e.g. terms of pledge, type and duration of planned gift, maximum period for achieving endowment minimum, alternate purpose if endowment minimum is not met within prescribed time period -- *if you require additional space, please attach a separate document with corresponding numerals*)

### VII. Expenditures

Expenditures typical of \_\_\_\_\_

Please use the space below to list other or additional expenditures that will be made from spending allocations.

### VIII. Attachments – check all that apply

- Pledge schedule form, pledge card and/or major gift transmittal  
 Written proposal  
 Planned gift transmittal and/or Heritage Society enrollment form  
 Corporate/foundation grant award letter  
 Other: \_\_\_\_\_  
 Other: \_\_\_\_\_

### IX. Additional information that might be helpful in preparing a draft agreement/description.

Submitted by: \_\_\_\_\_

Date: \_\_\_\_\_

Please send completed form electronically to:

Elaine McGill  
emcgill@gsu.edu